



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Scheduled Report - public distribution

Date: 12/15/1998

GAIN Report #NL8062

The Netherlands

Citrus

Citrus Annual Report

1998

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Report Highlights:

Overview of the citrus market in the Netherlands in 1998/99

Includes PSD changes: No
Includes Trade Matrix: Yes
Annual Report
, NL

Oranges	<u>1</u>
Grapefruit	<u>1</u>
Tangerines	<u>2</u>
Juices	<u>2</u>
Trade Matrices	<u>3</u>

Oranges

In the 1998/99 season, Spain, the major orange producing country in the Mediterranean area is expected to produce a six percent lower crop compared to last year. Morocco is expected to produce an 18 percent smaller crop. Orange prices in Rotterdam are stable and, according to importers, at satisfactory levels. The U.S. is only a marginal exporter of oranges to the Netherlands and this will not change in the 1998/99 season.

Domestic consumption of oranges amounts to 25 kilos per capita and has been decreasing for a number of years. The main reason is that the younger generation finds that oranges are difficult to peel and tend to prefer foods that are convenient.

Grapefruit

The Netherlands is a large importer and re-exporter of grapefruit. With a market share of over 50 percent, the United States remains the most important supplier to this market. While domestic consumption of grapefruit remains stable at about 2 kilos per capita, re-exports continue to grow. This of course is related to the transshipment function of the Rotterdam harbor. The Polish and Russian markets which were becoming important outlets for U.S. grapefruit in the past few years, have dropped in significance this season mostly because of the financial crises in Russia.

Through the end of October 1998, prices of Florida grapefruit at the Rotterdam auction were quite satisfactory DFL 24 to DFL 25 (\$ 12 to 12.50) per case. However after that prices started to drop. By mid December, a box of Florida grapefruit was selling at the Rotterdam auction for about DFL 12 to 15 (\$ 6.30 - 7.90) which is a 25 percent drop compared to the same period last year. Rotterdam traders complain that they are selling about 30 percent below their cost price. They mention that the west European market is oversupplied with grapefruit. The problem seems to be that Florida has a lot of small fruit this year (size 56 and 64) of which a large amount is coming to the Benelux markets. Not only Florida is shipping grapefruit but as of the beginning of November, other suppliers such as Cuba and Turkey are starting to sell grapefruit as well. However the quality of this origin grapefruit is lower than from Florida. The quality of the Florida grapefruit is considered good by Rotterdam traders, however the freshness is not as good as in other years. Grapefruit from Cuba and Turkey is selling at lower prices.

Rotterdam traders are not very optimistic about the possibility of increasing price levels for grapefruit during the remainder of the season.

Tangerines

The tangerine remains a very popular fruit among the Dutch consumer. The 1998/99 tangerine production in Spain is expected to drop by about 10 percent compared to the last season. The mandarine production in Morocco is expected to be down by two percent.

Depending on availability of mandarines from Spain by the end of their season, California minneolas and Florida tangelos will be imported in limited quantities from the end of February until March/April to prolong the marketing season for tangerines in the Netherlands. As it looks now, there might be improved opportunities for U.S. exporters of minneolas and tangelos this time around.

Juices

The Netherlands is a major importer, processor and re-exporter of orange juice. The fresh-not- from-concentrate (NFC) orange juice is imported into the Netherlands, practically all from Florida, and practically all re-exported to other EU countries with emphasis on the U.K., France and Italy. In the Benelux countries and Germany the less expensive chilled orange juice from concentrate is more popular than the NFC juice because of the lower price.

Until 1998, the European orange juice markets have been growing by an average of about 6 to 9 percent per year. However, 1998 growth of the European orange juice market has come to a stand still. The reasons include the negative influence of a bad summer, sharply increased orange juice prices and the financial crises in Russia. However Dutch traders/processors foresee that the demand for higher quality orange juice in Europe will continue to grow in the coming years.

Trade Matrices

Import Trade Matrix			
Country:	The Netherlands	Units:	Metric Tons
Commodity:	Oranges		
Time period:	CY		
Imports for	1996		1997
U.S.	1,523	U.S.	810
Others		Others	
E.U.	178,853	E.U.	193,533
-Spain	117,559	-Spain	138,044
-France	18,268	-France	17,286
-Greece	7,590	-Greece	17,034
-Belgium/Lux	22,591	-Belgium/Lux	12,537
South Africa	26,890	South Africa	48,418
Argentina	40,926	Argentina	39,611
Brazil	60,153	Brazil	38,708
Morocco	36,777	Morocco	33,042
Uruguay	15,118	Uruguay	18,177
Total for Others	358,717		371,489
Others not listed	19,885		16,994
Grand Total	380,125		389,293

Export Trade Matrix			
Country:	The Netherlands	Units:	Metric Tons
Commodity:	Oranges		
Time period:	CY		
Exports for	1996		1997
U.S.		U.S.	
Others		Others	
E.U.	100,667	E.U.	143,863
-U.K.	6,825	-U.K.	50,250
-Germany	32,068	-Germany	27,069
-Belgium/Lux	20,585	-Belgium/Lux	21,550
-Spain	7,086	-Spain	12,916
-France	12,587	-France	8,072
-Finland	3,637	-Finland	6,094
-Sweden	4,792	-Sweden	5,243
Russia	18,257	Russia	12,491
Poland	5,711	Poland	6,601
Total for Others	106,378		150,464
Others not listed	34,902		22,945
Grand Total	141,280		173,409

Import Trade Matrix			
Country:	The Netherlands	Units:	Metric Tons
Commodity:	Tangerines		
Time period:	CY		
Imports for	1996		1997
U.S.	561	U.S.	672
Others		Others	
E.U.	82,261	E.U.	97,846
-Spain	53,829	-Spain	73,670
-France	13,878	-France	13,375
-Belgium/Lux	7,462	-Belgium/Lux	5,924
-Germany	1,501	-Germany	2,031
Morocco	12,205	Morocco	11,655
Argentina	16,096	Argentina	8,857
Uruguay	7,647	Uruguay	7,228
South Africa	2,803	South Africa	4,744
Turkey	1,815	Turkey	2,717
Total for Others	122,827		133,047
Others not listed	5,735		4,988
Grand Total	129,123		138,707

Export Trade Matrix			
Country:	The Netherlands	Units:	Metric Tons
Commodity:	Tangerines		
Time period:	CY		
Exports for	1996		1997
U.S.		U.S.	
Others		Others	
E.U.	41,914	E.U.	47,149
-Germany	20,374	-Germany	16,428
-U.K.	5,675	-U.K.	12,057
-Finland	3,315	-Finland	4,855
-Belgium/Lux	2,616	-Belgium/Lux	4,267
-Sweden	3,710	-Sweden	3,392
-Denmark	1,536	-Denmark	2,085
-Ireland	1,485	-Ireland	1,941
Russia	12,822	Russia	24,195
Poland	8,234	Poland	7,935
Total for Others	62,970		79,279
Others not listed	8,457		9,431
Grand Total	71,427		88,710

Import Trade Matrix			
Country:	The Netherlands	Units:	Metric Tons
Commodity:	Grapefruit		
Time period:	CY		
Imports for	1996		1997
U.S.	62,715	U.S.	68,027
Others		Others	
E.U.	19,317	E.U.	11,818
-Belgium/Lux	11,261	-Belgium/Lux	5,304
-Germany	3,813	-Germany	2,087
-France	2,285	-France	1,953
-Spain	1,260	-Spain	1,670
South Africa	6,942	South Africa	16,220
Cuba	7,483	Cuba	13,372
Argentina	15,287	Argentina	10,921
Turkey	6,418	Turkey	6,552
Israel	691	Israel	1,158
Total for Others	56,138		60,041
Others not listed	7,089		3,739
Grand Total	125,942		131,807

Export Trade Matrix			
Country:	The Netherlands	Units:	Metric Tons
Commodity:	Grapefruit		
Time period:	CY		
Exports for	1996		1997
U.S.		U.S.	
Others		Others	
E.U.	60,683	E.U.	97,631
-Germany	30,041	-Germany	32,976
-U.K.	2,904	-U.K.	22,089
-France	13,153	-France	21,123
-Belgium/Lux	8,689	-Belgium/Lux	15,434
-Italy	2,141	-Italy	2,425
-Sweden	692	-Sweden	1,083
-Denmark	1,610	-Denmark	849
Russia	3,133	Russia	6,053
Poland	13,153	Poland	10,160
Total for Others	76,969		113,844
Others not listed	4,190		5,124
Grand Total	81,159		118,968

Import Trade Matrix			
Country:	The Netherlands	Units:	Metric Tons
Commodity:	Orange Juice		
Time period:	CY		
Imports for	1996		1997
U.S.	40,778	U.S.	31,097
Others		Others	
E.U.	93,962	E.U.	88,343
-Germany	68,106	-Germany	61,898
-Belgium/Lux	18,877	-Belgium/Lux	18,830
-France	2,648	-France	1,547
-Italy	1,804	-Italy	1,619
Brazil	308,331	Brazil	294,742
Cuba	5,897	Cuba	9,452
Israel	9,797	Israel	8,420
Argentina	1,302	Argentina	803
Total for Others	419,289		401,760
Others not listed	7,373		10,598
Grand Total	467,440		443,455

Export Trade Matrix			
Country:	The Netherlands	Units:	Metric Tons
Commodity:	Orange Juice		
Time period:	CY		
Exports for	1996		1997
U.S.		U.S.	
Others		Others	
E.U.	235,748	E.U.	279,210
-France	63,267	-France	72,803
-Belgium/Lux	24,052	-Belgium/Lux	36,414
-Germany	52,306	-Germany	77,802
-U.K.	51,798	-U.K.	95,190
-Spain	8,967	-Spain	9,432
-Ireland	8,676	-Ireland	9,091
Russia	3,710	Russia	1,427
Switzerland	643	Switzerland	1,417
Estonia	845	Estonia	632
Total for Others	240,946		282,686
Others not listed	8,254		7,439
Grand Total	249,200		290,125